

REQUEST FOR INFORMATION (RFI)

RFI 19-109E

For

STUDENT INFORMATION SYSTEM



RFI Release Date: November 28, 2018

Written Questions Due: All questions must be submitted by email to harmoni.clealand@browardschools.com
Questions must be submitted no later than 5:00 p.m. ET on December 14, 2018

*Submittals Due: On or before 2:00 PM, ET on January 9, 2019 in the Procurement & Warehousing Services Department

Location: The School Board of Broward County, Florida
Procurement & Warehousing Services Dept.
7720 West Oakland Park Boulevard, Suite 323
Sunrise, Florida 33351

Name of Contact: Harmoni Clealand
Purchasing Agent III
Email: harmoni.clealand@browardschools.com

**The School Board of Broward County, Florida Procurement & Warehousing Services Dept.
7720 West Oakland Park Boulevard, Suite 323 Sunrise, Florida 33351**

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Section 1: Response Form

RELEASE DATE: November 28, 2018

TITLE: Student Information System

Responses must be submitted to the Procurement & Warehousing Services Department of The School Board of Broward County, Florida, 7720 W. Oakland Park Boulevard, Suite 323, Sunrise, Florida 33351-6704, on or before **2:00 p.m. ET, January 9, 2019** and plainly marked **RFI 19-109E, Student Information System (utilize the included mailing label)**.

Responses received after 2:00 p.m. ET on date due will not be considered.

One (1) complete, original response (clearly marked as such), one (1) **additional copy**, and a flash drive containing vendor's response, including this **RESPONSE FORM**, must be fully executed and returned on or before 2:00 p.m. ET on date due to the Procurement & Warehousing Services Department in accordance with the submittal requirements. Response must contain all information required to be included in the response as described herein. Completed responses must be submitted in a sealed envelope (package, box, etc.) with the RFI number and name clearly typed or written on the front.

RESPONDENT'S INFORMATION

COMPANY NAME: _____

STREET ADDRESS: _____

CITY AND STATE: _____

TELEPHONE: _____

TOLL FREE: _____

CONTACT PERSON: _____

CONTACT PERSON'S ADDRESS: _____

CONTACT TELEPHONE: _____

CONTACT TOLL FREE _____

CONTACT FAX: _____

E-MAIL ADDRESS: _____

Section 2: Submission Instructions

- 2.1** Please submit your response by due date indicated below utilizing mailing label below. If utilizing a carrier such as FedEx or UPS, please affix the label in addition to the carrier's label, as the bid details below are critical to be viewable upon receipt.

RFI Response Due Date: January 9, 2019 at 2:00 PM

- 2.2 Questions:** Potential Respondents may submit questions by submitting an email inquiry addressed to: harmoni.clealand@browardschools.com on or before **December 14, 2018 at 5:00 PM**.

Answers to any questions received will be posted on www.Demandstar.com, which is the official distribution site for SBBC's solicitations.



FROM: _____
(Vendor's Name)

TO:

The School Board of Broward County, Florida
Procurement and Warehousing Services
7720 West Oakland Park Boulevard, Suite 323
Sunrise, Florida 33351

ATTN: Harmoni Clealand
RFI: 19-109E (SIS)

Section 3: Executive Summary

The School Board of Broward County, Florida (hereinafter referred to as "SBBC") desires to receive information on a comprehensive, integrated **Student Information System (SIS)** that can successfully provide the products and services described in this Request for Information (RFI). SBBC is the sixth largest school district in the United States and the second largest in Florida. SBBC provides pre-K through 12th grade education for residents of Broward County, Florida. For the 2018-2019 school year, SBBC has a student population of 271,517 that includes both traditional and charter school students. There are 234 traditional and 88 charter schools in the district. SBBC serves a diverse population of students from 204 countries, speaking 191 languages. Broward County is located in the greater Fort Lauderdale area with a population of over 1.8 million. The SBBC District Strategic Plan focuses on three essential goals: High-quality instruction, continuous improvement and effective communication. For more information on SBBC, visit: <http://browardschools.com>.

3.1 Overview of the Required SIS for this RFI: SBBC seeks to identify an SIS solution that can provide, implement and support the K-12 student information needs of a large, urban school district. SBBC seeks to identify providers that offer a core system with possible additional modules that can replace current, customized applications that are integrated into the existing SIS, or be used with third-party solutions that will be configured and integrated to provide the full range of system functionality to meet the SBBC goals as stated in this RFI. SBBC invites qualified SIS solution providers to submit a response that outlines software, system integration and implementation services. Providers are invited to respond with solutions that are locally hosted and/or cloud-hosted. The solution must meet interoperability standards.

3.2 Student Information System (SIS) Background Information: TERMS is the current SIS used in SBBC and has been in use since 1994. Throughout the years, TERMS has been highly customized and supported by internal staff. The district uses TERMS to meet the State of Florida requirements for FTE funding and reporting. TERMS integration with an internally developed Data Warehouse (DWH), which is used for the majority of local student reporting. TERMS is also highly integrated with many customized, internally developed applications, as well as many 3rd party applications. TERMS is built on a legacy technology, which is the COBOL programming environment. The district is looking to move to a modern, state of the art application environment.

3.3 Purpose of RFI: The purpose of this RFI is to:

- Share SBBC's vision, objectives and challenges around student data collection and management.
- Determine the landscape of interested vendors who have experience in implementing SIS for large urban school districts with over 100,000 students for the purpose of replacing the current TERMS application.
- Learn about each vendor's vision for student data along with product development plans, technical architecture, and implementation approach.
- Learn about each vendor's suite of applications that may lead SBBC to replace some of our current customized and 3rd party applications.
- Use the information provided by vendors to refine the list of functional and technical requirements.
- Initiate programmatic and technical activities, including a review of processes, to begin preparing the SBBC environment for a new student data solution.

This is a Request for Information (RFI). It is not intended, nor will it be used, as a procurement document and as such, the focus is on obtaining information that could possibly be used in a formal Request for Proposal/Invitation to Bid. This RFI does not commit SBBC to contract with any respondent's response submitted under this RFI. Respondents are advised that SBBC will not pay for any information or administrative costs incurred in response to this RFI; all costs associated with responding to this RFI will be solely at the interested parties' expense. Submissions will not be returned and failure to respond to this RFI does not preclude participation in any future RFP/Bid, if issued. After the responses are reviewed, interviews may be scheduled with respondent(s).

Section 4: Scope of Services

4.1 Goals and Objectives for Student Data: The goal for this RFI is to assess the market to determine SIS functionality and capabilities available for an eventual replacement of TERMS. SBBC seeks to identify one or more qualified integrated student information systems based on best business and technology practices for student information management in PreK-12 education. Qualifying solutions will enable key stakeholders to perform their business activities with the most streamlined and efficient processes, and will make real-time student progress and reporting available. In support of these goals, SBBC has the following objectives:

- 4.1.1 Provide all stakeholders, including parents and students, with user-friendly, flexible and dynamic access to SIS functions.
- 4.1.2 Provide a scalable solution that can continue to support over 271,000 students and 30,000 employees.
- 4.1.3 Improve the efficiency of business processes by reducing or eliminating paperwork, manual processes, duplicate data entry, in addition to improving workflow and approvals.
- 4.1.4 Improve services to students and parents through portals that allow for easy registration and access to pertinent student data.
- 4.1.5 Enable the secure transfer of student information to 3rd party applications using applicable data standards.
- 4.1.6 The SIS must meet ADA compliant standards for web accessible design. These standards state that all electronic and information technology must be accessible to people with disabilities. This applies to all information technology, including software. Documents created and made available to a webpage must meet standard WCAG 2.1 level AA (Web Content Accessibility Guideline).

4.2 SBBC Student Information System Vision and Challenges: SBBC is in search of a state of the art SIS that will meet our needs for the near future. SBBC is looking to see what the marketplace offers in reference to the following functionalities that may be available. Vendors are requested to review the vision and the challenges outlined below. As you answer the questions in section 6, please indicate how your solution will help SBBC overcome these current challenges to meet the vision. If possible, please share examples of how you have helped other school districts overcome similar challenges.

Scheduling

Vision: The SIS has a robust online scheduling system that collects course requests from students, master schedule definitions from the schools and run the program that creates school schedule. Scheduling is a reiterative process for placing students so it produces and continuously changes schedules over a specific time while ensuring that the district meets class size requirements as outlined by the State of Florida.

Challenge: As a large, urban school district, SBBC supports multiple school configurations and scheduling options. These include:

- Traditional elementary, middle, and high school configurations, in addition to K-12, K-8, 6-12 schools.
- Alternative centers that support special needs, dropout prevention, juvenile justice, and pre-Kindergarten,
- Virtual School
- Charter schools
- Dual Enrollment with Colleges

There are many challenges around supporting these multiple school configurations and the various scheduling models supported to meet school needs. The scheduling models include: Year-round, rotator, block, alternate day, and virtual school. Students can be enrolled in one school but can be scheduled for classes in other schools. We also have built an online system to electronically collect course requests from students, eliminating a paper process, which needs to be addressed.

Attendance

Vision: The SIS accurately reports daily attendance as required by the State of Florida, while supporting the myriad of local attendance reporting requirements. The SIS integrates seamlessly with other systems that may collect attendance information such as a teacher gradebook, a discipline management system or a transportation system.

Challenge: Broward records period-by-period attendance from the teacher in our gradebook (Pinnacle) but stores only daily attendance in TERMS. It is a negative attendance reporting system. Attendance is first loaded from a specific reporting period identified by each school, then a script is run each night that clears the absence if a student was marked present by any teacher that day. If a student is tardy or released early, these minutes are recorded and included in the truancy calculation. TERMS is connected to our discipline and alternative suspension systems so that attendance taken at these sites is written back to TERMS.

Grade Reporting

Vision: The SIS supports various grading options such as rubrics, standards, performance-based and letter grades. The system is flexible to handle multiple locally defined final grade calculations.

Challenge: Currently the district supports rubric grades in K-2 and letter grades in 3-12. Report cards for K-5 are printed locally by each elementary school via the gradebook, while report cards for grades 6-12 are printed at the district office and sent to the schools. Based on the various scheduling models, the district uses multiple calculations based on the number of marking period, exam, and State End-of-Course (EOC) grades collected for determining the final grade that would be added to a student's transcript for a course. SBBC is considering moving to a performance-based grading structure for the lower grades and the new system will need to meet this challenge.

Transcripts

Vision: The SIS supports the use of the State of Florida's Automated System for Transferring Educational Records (FASTER). Transcripts are also integrated with 3rd party applications and the system supports a district defined transcript for distribution to non-FASTER schools.

Challenge: SBBC is required to use the FASTER system to send transcripts to other districts and colleges within the State. Here is a link to FASTER: <http://www.floridastudentfinancialaid.org/faster/man1617/index.htm>
Broward also prints transcripts using the State's layout used for non-FASTER schools and has several options for creating large pdf files of transcripts that can be loaded into our current student planning tool- Naviance.

State Reporting

Vision: The SIS completely handles the collection and reporting of data to the State of Florida.

Challenge: There are currently eight (8) survey reporting cycles throughout the year when SBBC is required to transmit various data to the State of Florida, primarily to receive funding. The data requirements are fairly complex and constantly changing and of course, many times the district is given little lead time to make adjustments. Meeting the State requirements can be a very time-consuming, manually intensive endeavor. For more information on the State of Florida Student Information Database Reporting, see <http://www.fldoe.org/accountability/data-sys/database-manuals-updates/index.stml>

Currently the district separates the State reporting data from the operational data. A "snapshot" of student information is taken and separated into its own database to manage during the reporting cycle. This allows operations to continue in the production system. *SBBC would consider options for State reporting outside of the core SIS.*

Test Scores

Vision: The SIS supports multiple test score formats to accommodate National, State, and local assessments that are administered to students.

Challenge: Broward collects student test score data from various sources such as the State of Florida, the College Board, Cambridge, and local tests. Each test comes with its own unique score types. Loading those scores into our system is a challenge in matching the data from an external vendor with the data we have internally and mapping it to our student information database. Broward only keeps test scores in TERMS if they are required for State reporting. These and any other test results are stored in our data warehouse.

Discipline Reporting

Vision: The SIS includes an integrated discipline management system that centralizes all incident reporting. The district defines incidents and the corresponding consequences based on grade level. The system tracks investigations and decision-making. Consequences are escalated based on repeated violations. The system tracks student participation and progress in the various behavior programs that exist in the district.

Challenge: SBBC has developed several systems to meet our local discipline needs as well as comply with the State of Florida requirements. Broward uses a local matrix of incidents to actions to ensure discipline is uniformly administered throughout the district. With the exception of the disciplinary centers and the charter schools, all discipline is entered into our local system first and from there transferred into TERMS. Many incidents are tracked that do not rise to the level of needing to be reported to the State but are recorded in TERMS as part of the student's discipline history. Broward shares data on student's arrests with our local law enforcement agencies to share data. The disciplinary system is integrated into many other systems to ensure data is shared effectively, for example the scheduling of transportation to alternative centers.

Registration Process

Vision: The SIS includes an online registration module for new parents that outlines the process, collects all of the necessary information and documentation required, and schedules an appointment with the school staff. The system allows the parent of the currently enrolled student to manage their contact information and submit the required back to school forms at the start of each school year.

Challenge: Broward has built its own customized system to support the various choice programs in the district. It is not a new student registration system. These programs allow parents of students who are already registered in TERMS to apply to programs offered at schools other than their boundary school. Examples include:

- Magnet programs
- Student Re-assignments
- McKay Scholarship program
- Nova Schools program

Each customized system collects registration information from parents, runs a lottery, produces awards, sends notifications back to parents and schools, and tracks incoming and outgoing students to determine available seats. Each application is unique and the parent may fill out multiple applications for either each program or for each student. The district has also built a standalone back to school registration process that collects the information required at the start of each school year.

Yearly Rollover

Vision: The SIS allows schools to work in multiple school years at the same time.

Challenge: At the end of each school year, SBBC runs processes to promote/retain students, move them to different schools, archive the previous year, and re-initialize fields for the new year. Multiple calendars roll over at different times. Our challenge is that schools need to work in the next school year before the current school year is completed.

Data Archiving

Vision: The SIS stores 20 plus years of historical records online for current and former students.

Challenge: Currently there is a duplicate TERMS system where inactive students who have not been in the district for over five years are stored. This is called the TERMS archive system and this system was set up to improve performance of the production TERMS system. The Records Retention department uses the archive system to produce transcripts for students who have graduated in previous years as needed. Frequently, changes are made to names and birth dates, or credits and test scores are added to a student's record so they can be awarded a diploma. Between the two systems, there is about 25 years of student data available online.

Multi-Language Support

Vision: The SIS supports the distribution of communication with parents in multiple languages as designated by the district.

Challenge: SBBC currently supports four languages for communications with parents: English, Spanish, Portuguese, and Haitian-Creole. SBBC will be adding Arabic and Japanese shortly. All documentation (letters, forms, surveys) must be translated into multiple languages. Therefore, the SIS parent portals and other web facing interfaces need to have the ability to be translated into multiple languages.

Empowering Student Success through Parent and Student Portals

Vision: The Parent Portal collects and disseminates information to parents/guardians, and creates more effective communication with parents. SBBC sends alerts to parents, connects to 3rd party parent resources such as the online school payment systems and academic resources. Parents manage their contact information, provide yearly updates to pertinent back to school information, authorized student pick-ups from school, read and accept the SBBC code of conduct, register a child, ask for school reassignment, participate in the choice program, monitor and track their child's academic performance both during the school year and historically, and view report cards. Parents view school counselor and teacher calendars and pick appointment dates.

The Student Portal collects and disseminates information to students, enables student access to graduation or promotion progress, collects course requests from students, predicts academic progress based on scenarios or career goals, provides a student progress dashboard, enables students to request transcripts, and monitors their academic performance both during the school year and historically, and submits schedule change requests. SBBC sends alerts to students. The student portal is a repository of required documents that are part of a student's history during their time at SBBC.

Parent and student portals are accessible through mobile devices.

Challenge: To meet this need, SBBC currently has developed several local applications that provide web-based access for parents and students to the academic history for a student. These applications:

- Allow for student and parent tracking of academic history, school assignments, graduation process
- Collect information via surveys
- Collect online course requests from students
- Allow students to register for classes such as driver's education
- Collect Back to School data from parents
- Collect Choice Applications from parents
- Allow parents to associate their account with multiple children

The applications for the most part standalone and are not integrated with each other. We currently provide limited access to student data via a mobile application through a 3rd party provider.

Data Integration:

Vision: The SIS supports seamless integration with current and future applications using interoperability standards (IMS Global). The integrations occur fluidly, regularly, automatically and easily with little or no staff support once configured. These integrations include mission critical applications such as SBBC's learning management system, (currently CANVAS), gradebook (currently Pinnacle), transportation (currently Edulog) systems. Please refer to the SBBC Current Architecture Map for more detail on current 3rd party applications needing data integration (Appendix 1).

Challenge: As indicated on our current SIS architectural environment, SBBC currently interfaces with many different vendors and local/state agencies. These interfaces are more complex than just simple student rostering and each one requires different data formatting requirements. They have all been developed locally in coordination with the specific vendor or agency.

Security

Vision: The SIS would be a highly secure, role-based application that can provide targeted, least-privileged, access to end users based on their role and give access to only the information needed for end users to do their job tasks (see section 4.5 Chart of SBBC End Users). It would enforce FERPA and HIPA laws and have an audit function that provides information on who is accessing and changing any record in the system, include date and time of change, IP source of change, and display before and after images of the change. It would have the ability to shut down access to a specific student in a crisis situation. Authorization to the system would be controlled through the districts identity management system.

Challenge: Currently there are 20 different security profiles in TERMS that control the ability to access and update the various panels that exist. Recent events have caused use to re-examine our existing security procedures and identified some shortfalls. For example, our current system does not provide for field-by-field level security without significant programming. SBBC does not have any way of tracking what has been accessed or by whom, we only track what has been changed. In addition, we have various district support personnel who need access to the entire district and some that only need access to selected schools and not the entire district. That function is not easily supported in our current environment. In terms of charter schools, the District is required by our local School Board to isolate the charter school data from the view of other schools or other charter schools.

Charter School

Vision: The system will support the collection and reporting of charter school data as required by the State of Florida, support the movement of students between district and charter schools, and support the logical separation of data as required by law.

Challenge:
SBBC currently supports 88 charter schools and the number fluctuates from school year to school year. While the District is required to report their student information to the State of Florida for funding purposes, locally, charter schools are setup as separate institutions with restricted access to information. This is a challenge as students are constantly moving back and forth between district and charter schools. Many of the local programs do not support charter schools since they are not required to follow the district's requirements, but there are some that the District allows them to opt into, thus in many cases there are a separate set of rules for charter schools.

Dashboard Reporting Capabilities

Vision: The SIS system creates and displays graphical representations of student data in charts and gauges at the district and school level and can drill down and refine the data for ease of communication to end-users.

Challenge: Currently the district utilizes a reporting tool that is no longer supported by a vendor to provide schools with a menu of reports from our data warehouse. We also have a locally developed data management tool for monitoring student academic and behavior indicators. Most reports are at the student detail level, with few summarizations by school or district.

Create and manage Electronic Forms

Vision: The SIS contains a workflow system that allows the district to define the forms used to track students in various programs throughout the district.

Challenge: The district is still highly dependent on many paper-based processes. Many of the customized applications developed by SBBC are attempts to move these processes to an electronic format. SBBC is looking for a system to easily create forms, align workflows and approval processes, collect electronic signatures, and manage and share forms with appropriate staff.

4.3 Current SBBC Conceptual Application Architecture Map: In Appendix 1, a visual depiction of the current SIS architecture shows the applications, interfaces and data stores currently collecting and managing student data. The description below corresponds to Appendix 1 is to be used to further explain the SIS architecture. The conceptual architectural map is divided into three sections: Core SIS Functionality (TERMS), Custom Applications and Key SBBC interfaces/3rd party vendors. A description of each section follows:

4.3.1 Core SIS Functionality (TERMS): This section of the map shows the major functional areas that are part of the TERMS system. SBBC seeks at a minimum to replace these functions with a new system. Each core function is described here:

Registration: These modules cover the initial creation of the student record, assignment of the student number, school placement, collection of demographics, health information and student contacts.

Interactions: These modules cover the basics of student data collection such as attendance, discipline, test scores, grade reporting, academic history, graduation progress, student obligations, student interventions, accidents/safety and dropouts. Some of the data is directly entered into TERMS, while others come from integrated applications such as a 3rd party gradebook, locally developed discipline system and a 3rd party library/textbook management system.

Reporting: These modules cover the production of transcripts, reporting to the State of Florida, Department of Education and providing data to the data warehouse for student reporting. For performance reasons, the majority of SBBC Ad Hoc student reporting comes out of the data warehouse and not out of the operational system, TERMS.

Rollover: These modules cover the basic process of ending one school year and setting up the system for the new school year. Includes processes for archiving data, promotion and retention of students, placement of students in CHOICE programs and matriculation of students from one school to another (for example, from elementary to middle school).

4.3.2 Custom Applications: This section contains a list organized by topic of the custom applications developed internally by SBBC. On the conceptual map, the applications in GREEN read or write to the TERMS database. The applications in RED read or write to the SBBC data warehouse. Any replacement of TERMS will require the applications in GREEN to be modified by SBBC unless they are replaced by the new system. Any applications in RED would not be impacted by a replacement of TERMS as long as the new system feeds the existing SBBC data warehouse.

Many of the custom applications have been developed to meet very specific, SBBC internal requirements and SBBC would not expect to see them offered as part of a new SIS. However, some applications, we believe, are becoming more common in the marketplace such as: New student registration module, a school choice application module, an RtI (Response to Intervention) module, a discipline management module and a class size tracking module.

4.3.3 Key SBBC Interfaces/3rd Party Vendors with whom data is shared: This section identifies the key 3rd party vendors with whom SBBC is currently sharing data to populate their systems (one direction). In some instances, SBBC receives data back from the vendor to populate TERMS (Bi-Directional). As examples, TERMS interfaces with *Edulog* for bus assignment information, with locally developed programs for scheduling, and with *EasyIEP* for tracking students with disabilities.

For custom and 3rd party applications, SBBC can either require the new vendor to keep the current connections to these applications or replace them if a vendor's SIS system has these modules. Therefore, SBBC is interested in what each responding vendor has to offer on the applications that are either custom or 3rd party as described in Appendix 1.

4.4 Current Technical Architecture.

SBBC is providing a description of the current technical architecture for informational purposes only so that responding vendors can see what can be leveraged with their system.

1. TERMS runs on an iSeries box using a DB2 database with the following specifications:
 - a. IBM iSeries 8205-E6B
 - b. Operating System: R7V2
 - c. Total Disk Space: 5,301,986 megabytes
 - d. Main Storage: 43,776 megabytes
 - e. Disk Space Utilized: 2,859,660 megabytes
 - f. Database Management System: DB2
2. SBBC uses an ETL tool to extract data from TERMS, based on transactional logs, to feed into the DWH
3. SBBC also uses nightly batch processes to copy and synchronize databases in the DWH with TERMS

Custom Application Environment

- SBBC web applications have been developed in a mix of ASP Classic, ASP.NET, C#, and JavaScript
- DB2 and SQL databases are both utilized in our web applications

4.5 **Chart of SBBC End Users**

SBBC views meeting the needs of the users of student data as key to the success of an SIS implementation. Below is a sample of key stakeholder roles that either produce and/or consume student data. The ability of these stakeholders to access, analyze and produce reports within a user-friendly interface related to student data will drive productivity, efficiency, data accuracy and communication. Therefore, a user-focused solution that meets the needs of these users is essential to a successful implementation. As you complete this RFI, describe how your system will assist SBBC in providing a user-friendly solution for the end users as they complete the tasks outlined.

District Based Users	District Tasks
State Reporting Team	<ul style="list-style-type: none"> • Manage state reporting cycles
Production Control Team	<ul style="list-style-type: none"> • Report Card production and distribution • System Configuration
I & T Service Desk	<ul style="list-style-type: none"> • Training • Troubleshooting & end user staff support
District Staff from various Academic Departments	<ul style="list-style-type: none"> • Assist with Program management • Enter records for schools • Help schools manage student populations to ensure accurate coding and funding • Auditing • Exceptional Student Information and Bilingual/ESOL coding • Home Education, Migrant student tracking
Budget Staff	<ul style="list-style-type: none"> • Verification and audit of records
Boundaries Department Staff	<ul style="list-style-type: none"> • Verification of student addresses
Security Staff	<ul style="list-style-type: none"> • Records review
Information & Technology SIS Team	<ul style="list-style-type: none"> • Integrate internal and external systems that need student data for instructional and operational use. • Insures the integrity of data across all SBBC systems. • Monitor and improve processes for collecting and managing student data.
School Based Users	School Tasks
Principal	<ul style="list-style-type: none"> • Monitor performance of students including identification of struggling and at-risk students • Ready access to student data
Assistant Principal	<ul style="list-style-type: none"> • Create master school schedule • Track and document discipline data • Monitor student performance
IMT/IMS	<ul style="list-style-type: none"> • Data Entry / Updating of student records
Registrars	<ul style="list-style-type: none"> • Schedule and Grade Changes
Attendance Clerks	<ul style="list-style-type: none"> • Verify attendance data
Guidance Counselors	<ul style="list-style-type: none"> • Evaluate Graduation Requirements • Approve Grade Changes
Portal Users	Tasks
Parents/Guardians	<ul style="list-style-type: none"> • Ready access to their child's student data as described in the Parent Portal section of this document
Students	<ul style="list-style-type: none"> • Ready access to their individual student data points needed to track progress towards promotion or graduation goals and as described in the Student Portal section of this document

Section 5: Vendor Qualifications

Describe your firm by supplying information as requested below. Responses should be organized in a manner consistent with this section.

5.1 Letter of Transmittal. The transmittal letter should be a brief abstract, including experiences and strengths of the respondent of no more than one (1) letter-size pages stating the respondent's understanding of the nature and scope of services to be provided as the respondent's capacity to provide SBBC with the required solution, system and/or services.

5.2 Experience and Qualifications

- 5.2.1** Provide a brief history on your organization including headquarters, division and operations. Include how long your organization has been in operation and whether it is owned by a parent company or whether it owns other companies as a parent organization.
- 5.2.2** What is your company's annual gross revenue? How many total employees does your company have? How many are dedicated to product development and what is the breakdown of their roles?
- 5.2.3** Does your company have a similar client base as SBBC, which is a large, urban school district with a student population of over 100,000?
- 5.2.4** Provide school district references where your company has successfully implemented the current software release of the student information system, with a core suite of modules. Core suite of modules includes student registration, enrollment, demographics, attendance, discipline, assessment, scheduling and grades.
- 5.2.5** What lessons have you learned about implementing and supporting your products in large school districts? Based on your experience, what are the biggest success factors to implementing your company's product on time and within budget?
- 5.2.6** List State of Florida districts using your product along with contact information, district size, go-live date and products implemented.

Section 6: Solution Questions

Throughout this RFI, SBBC has described their vision, challenges and current technical and application architecture. Based on the information provided, which is to be used for an in-depth explanation and reference, please respond to the questions below. All responses to this RFI should be organized in a manner consistent with this section. Responses will be reviewed to determine features that would best serve the needs of the District.

Technology

- 6.1** Currently, we are using an iSeries power 9 server OS R7V2 utilizing a DB2 400 database to host our TERMS and data warehouse databases. If needed, would your solution run in this environment?
- 6.2** Provide a detailed description of on-Prem versus cloud hosting, application services and storage space options provided by your organization. Describe the preferred hosting model for the product and note whether it is managed in a single instance or multi-tenant mode.
- 6.3** If your solution is on-Prem, what is the required hardware configuration? Can it be hosted in a virtualized environment?
- 6.4** If your solution is cloud-based, is it within a private or public cloud? Who is the cloud provider? What level of support do you have from that vendor?
- 6.5** With regards to challenge around data archiving, describe the methodology you would utilize to convert 25 years of student data. How does your solution support the maintenance and archiving of historical data moving forward?
- 6.6** Describe your approach to how student data is converted and migrated into your solution. Do you have any tools or processes to help with data conversion or to troubleshoot data issues?
- 6.7** Describe any processes used to ensure data integrity of the data within your solution.
- 6.8** What are the biggest issues that other clients face in preparing their data? How should SBBC prepare its data for conversion?
- 6.9** In regards to our challenge on data integration with various 3rd party software, how does your system support ease of integration with 3rd party vendors who need student data to support their applications?
- 6.10** Integration with various 3rd Party Software: Do you currently exchange data with any of the 3rd party applications indicated on our current SIS architectural environment map?
- 6.11** Describe how your solution supports IMS Global interoperability standards to interface with other systems.
- 6.12** Describe the integration of the recommended technologies with other systems (including data standards and integration standards). What integration options are available for your platform (API integration, Database cloning, ETL, Queries, Reports)?
- 6.13** Describe how your product handles authentication and authorization, including single sign-on capabilities.

Core Functional Areas

- 6.14** Scheduling: Tell us how your scheduling options would support the vast array of configurations and student and teacher assignments. In your response, include support for collecting online course requests by students as part of the scheduling process for a new school year.
- 6.15** Attendance: How would your attendance system support the unique attendance requirements? How does your attendance system support multiple calendars within the schools such as alternate days?

- 6.16** Grade Reporting: SBBC has local grade calculation routines of 4 grades, 5 grades, 6 grades, weighting marking period grades, exam grades and end of course grades. Describe how your grade reporting functionality would support these various calculation routines.
- 6.17** Transcripts: Describe your transcript system and indicate whether it complies with the State of Florida's FASTER requirements.
- 6.18** FTE State Reporting: Does your system support the State of Florida's requirements for FTE reporting? See link that follows:
<http://www.fldoe.org/core/fileparse.php/7508/urlt/1819FTEGeneralInstruct.pdf>
- 6.19** Reporting: How would your system support a multi-tiered environment as part of the reporting process? Provide a list of available standard reports and describe all commercially available technologies that comprise your reporting system (i.e., SSRS, Crystal Reports, Cognos, etc.).
- 6.20** State reporting is a reiterative cycle that includes sending data, error identification and correction, resending data and re-correcting errors until the cycle is over. Describe if your system supports a reiterative state reporting cycle?
- 6.21** Managing the Testing Process: How does your system manage the collection and mapping of test score data from various sources?
- 6.22** Registration Process: How could your system help with streamlining the choice process in Broward? One of the challenges around this process is the fact that we don't have a concept of a household where we connect one set of parents to multiple children. Our current system defines a set of parents per student but lacks the ability to connect families together. Does your system address the issue of connecting family or households?
- 6.23** Yearly Rollover: Does your system support simultaneous processing of end of year and New Year activities?
- 6.24** Browser and Mobile Device Compatibility: Does your system provide a native, web-based, responsive design solution?
- 6.25** Parent and Student Portals: Referring to our challenge of empowering student success through Parent and Student Portals, how does your system support the functions SBBC needs in this area? Describe how your solution supports mobile devices such as tablets and cell phone access. Discuss the underlying system architecture used to meet this functionality.
- 6.26** Tell us if you have any modules that may address some of the custom applications that have been written in house for potential replacement.

Security

- 6.27** With respect to how your company protects confidential data and documents, does your system support least privileged, role-based security?
- 6.28** What kind of controls are available for these roles?
- 6.29** Do you have the ability to track changes and access to the system, i.e., to know when someone has looked at a record?
- 6.30** Can your system restrict access to a particular student? i.e., prevent anyone from accessing a particular student's record.
- 6.31** How would you provide security access to non-SBBC staff such as contracted staff, charter school staff?
- 6.32** Does your system support controlling and restricting access to only one school or location?

6.33 Describe how your product handles authentication and authorization, including single sign on capabilities.

Training and Knowledge Transfer

6.34 Describe in detail your company's approach to providing training and professional development to SBBC administrative and school-based staff to ensure effective implementation of the new system. What options do you provide to train district implementation staff, district-identified trainers, school-based administrators, and end-users?

6.35 Describe in detail your company's approach to ensuring knowledge transfer to SBBC staff who are responsible for production support once implementation is completed.

Technical Support

6.36 Describe the structure of your support model. Include the tiers you have and the escalation process. Have you modified this support model for large district clients? How do you ensure high client satisfaction levels?

6.37 What standard service-level agreements do you provide for the products/services indicated?

6.38 Have you entered into risk-sharing contracts based on performance?

Product development

6.39 Provide a copy of your company strategy for the next three to five years. Include a product road map describing current functionality, planned research & development and a release schedule for version upgrades. What is your release management methodology?

6.40 Explain the process your company follows to evaluate development decisions, (including enhancements/additions) to current products based on feedback from your education clients. Do you have formalized user groups? Do you have an annual product and/or user conference?

6.41 What are the challenges clients have faced if customizing your product?

6.42 What is the typical percentage of contract spent on customization and/or optional modules?

6.43 Describe the trends in student data you perceive to be unfolding in PK-12 education. How do your company's strategy, investment decisions (e.g. percentage revenue on SIS development), product development, implementation methodology, and support structure to address these trends?

6.44 How does your company handle requests for system enhancements on an ongoing and regular basis?

6.45 Describe how you currently schedule modifications to your products in anticipation and adoption of Federal, State or Local policy and/or legislative changes related to SIS rules. Please provide examples of related experience.

Project Management

6.46 What is your implementation methodology and approach to resources? Provide a high-level Gantt chart for an installation similar to this scope and scale.

6.47 What is your project management approach for new installations? What gates do you enact to control scope, schedule, and budget?

- 6.48** What resource structure would you recommend to SBBC to implement your solution? What resource structure would you recommend for long-term support? What type of resources would you provide for a client engagement such as the one described here?
- 6.49** How would you assist SBBC in managing the change process as it transitions to a new SIS system? Include how you would plan for system-wide end user communications (aka Organizational Change Management) to key SBBC stakeholders who would need to access and effectively use the new SIS.

Quality Assurance

- 6.50** Describe how your company accounts for quality assurance / control process. Include the reiterative and user acceptance testing process plus sign off procedure to ensure the system is fully functional before Go Live.

Section 7: General Terms and Conditions

- 7.1 Confidential and Proprietary Information:** SBBC is subject to Chapter 119, Florida Statutes [the "Public Records Law".] No claim of confidentiality or proprietary information in all or portion of a response to the RFI will be honored unless a specific exemption from the Public Records Law exists and it is cited in the response to the RFI.
- 7.2 School Board Privileges:** SBBC reserves the right to accept or reject any or all qualifications and to award to the respondent who, in the opinion of SBBC, will best serve the interests of SBBC. SBBC reserves the right to reject (1) any individual respondent who has previously failed to perform for contract(s) of similar nature; (2) any individual respondent who has a direct conflict in a current matter or case with SBBC; or (3) any individual respondent who, in the opinion of the Screening Committee, the Legal Services Committee or SBBC, is not in a position to successfully perform the requirements. SBBC reserves the right to request additional qualifications if it deems it necessary to do so. SBBC reserves the right to evaluate the performance of individual respondents based on any reference submitted by the individual respondent or any other reference which SBBC may request from other entities or parties. SBBC reserves the right to waive irregularities and technicalities in the determination of the selected respondent.
- 7.3 Responsibility of Respondents:** Respondents shall be responsible for reading, understanding, completing and complying with the requirements and scope of work of this RFI.
- 7.4 Minority/Women Business Enterprise (MWBE) Participation:** SBBC strongly advocates the inclusion of MWBE respondents in all School Board RFI's.
- 7.5 Non-Discrimination:** SBBC shall not discriminate against any respondent under this RFI because of race, age, religion, color, gender, national origin, marital status, disability or sexual orientation of the respondent.
- 7.6 Governing Law:** This RFI, and any resulting agreement, shall be governed by and construed under the laws of the State of Florida and will have exclusive venue in the Seventeenth Circuit Court of Broward County, Florida.
- 7.7 Public Entity Crimes:** A person or affiliate who has been placed on the State of Florida convicted vendor list following a conviction for a public entity crime may not submit an offer to perform work as a consultant or contract with SBBC and may not transact business with SBBC for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.
- 7.8 Compliance with Laws:** Each party shall comply with all applicable federal state and local laws, SBBC policies codes, rules and regulations in performing its duties, responsibilities and obligations pursuant to this Agreement.
- 7.9 Assignment:** Neither this RFI or any interest herein may be assigned, transferred or encumbered by any party, except if within the sole and exclusive discretion of SBBC; such interest may be assigned in writing.

Section 8: Statement of “No Response”

If your company will not be submitting a response to this Request for Information (RFI), please complete this Statement of “No Response” Sheet and return, prior to the RFI Due Date established within, to:

The School Board of Broward County, Florida
Procurement & Warehousing Services
Department 7720 West Oakland Park
Boulevard, Suite 323 Sunrise, Florida 33351
Email: harmoni.clealand@browardschools.com

This information will help SBBC in the preparation of future RFIs.

Company Name: _____

Contact: _____

Address: _____

Telephone: _____ Facsimile: _____ E-mail: _____

√	Reasons for “No Response”:
	Unable to comply with product or service specifications.
	Unable to comply with scope of work.
	Unable to quote on all items in the group.
	Insufficient time to respond to the RFI.
	Unable to hold prices firm through the term of the contract period.
	Our schedule would not permit us to perform.
	Unable to meet Scope of Services requirements.
	Unable to meet Minimum Eligibility requirements
	Unable to meet insurance requirements.
	Other (Specify below)

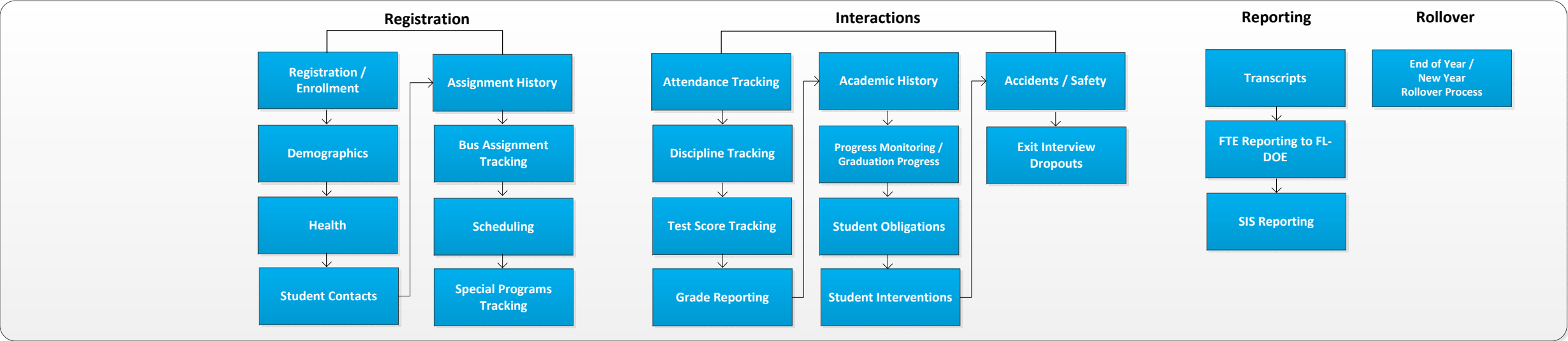
Comments: _____

Signature: _____ Date: _____

Appendix 1: BCPS Student Information System (SIS) – Current TERMS Conceptual Architecture

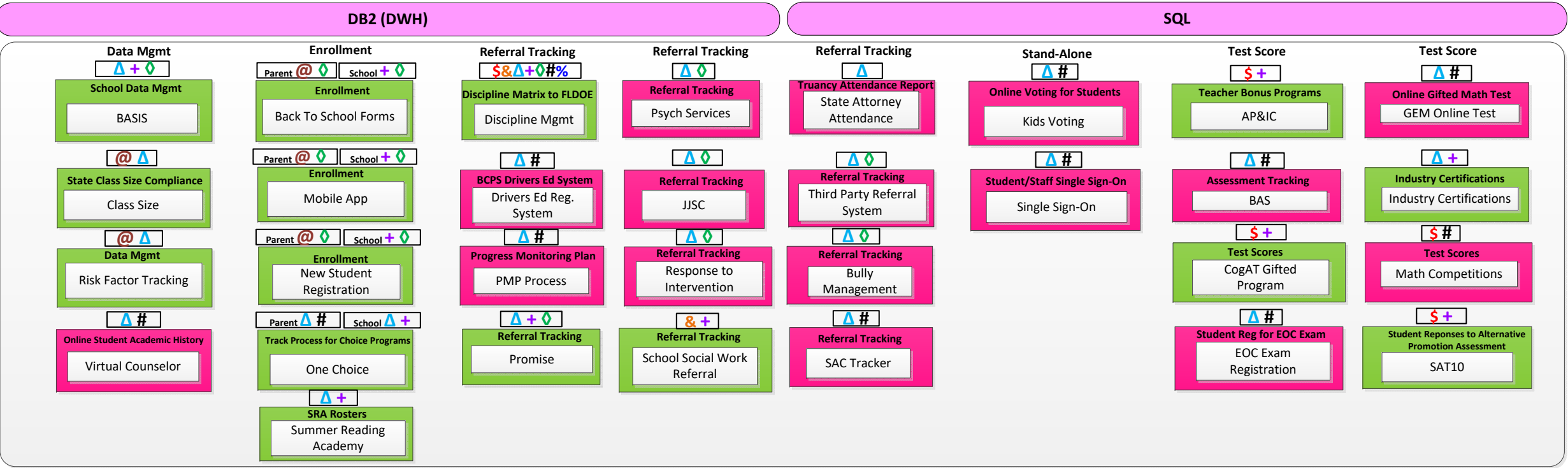
4/24/18

Core SIS
Functionality
(TERMS)



Extract Transform & Load (ETL)

Custom
Applications



Legend

- Core Functions
 - Custom Apps
 - Impacted by Terms
 - Not impacted by Terms
 - Interfaces
- Inputs/Outputs
- + To TERMS
 - @ From TERMS
 - # To DB2
 - △ From DB2
 - ◇ To SQL
 - & From SQL
 - ✓ Bi-directional
 - % To Transportation
 - \$ From External Provider

Key BCPS
Interfaces/3rd
Party Vendors
Whom Data is
Shared

